



ECM Tool Pilot Executive Review Session - Meeting Report May 16, 2002

**Steven R.
Jarboe**

Sent by:
Steven R.
Jarboe

05/21/2002
04:17 PM

To: Keith.Wilson@ed.gov, Cheryl.Queen@ed.gov
cc: David.Moore@ed.gov, Denise.Hill@ed.gov, Frank.Kidd@ed.gov,
Ganesh.Reddy@ed.gov, James.Cunningham@ed.gov, John.Hsu@ed.gov,
j.ronald.langkamp@accenture.com, Lin.Sheffield@ed.gov, Phillip.Wynn@ed.gov,
Samson.Abebe@ed.gov, yolanda.brooks@ed.gov, dlass@csc.com, gadams2@csc.com,
mhealy@csc.com, jgillott@csc.com, bgendler@csc.com, Jason R.
Niemczyk/Internal/Accenture@Accenture, kathryn.pirnia@ed.gov, david.elliott@ed.gov,
bing.yi@ed.gov
Subject: 5/16/02 **FSA ECM Tool Executive Review Session - Meeting Report**

Cheryl & Keith,

Here is a report on the FSA ECM Tool Pilot Go/No-Go Review Session held on 5/16/02 at 4:00pm.

1. Attendees:

- Cheryl Queen
- Keith Wilson
- Phillip Wynn
- Kathryn Pirnia
- Dave Elliott
- Ganesh Reddy
- Bruce Gendler
- Dave Lass
- Elisabeth Schmidt
- Ron Langkamp
- Bruce Bruning
- Steven Jarboe

2. Key Points Discussed Included:

- Pilot Success Criteria were reviewed and were determined by Executive Review Committee to have been met by the Pilot results to date. (Go Decision)
- Reviewed overall Tool activity and statistics (e.g. minimum, maximum and average time elapsed for CR resolution)
- Reviewed Pilot activities and Collaboration efforts to date
- Outlined Next Step Activities which include:
 - Tool Update
 - ECM Tool Production Pilot with FAFSA & CPS
 - ECM Tool Modernization Rollout (Phased rollout based on prioritization of ECM Tool rollout value to MP Teams)
 - Post-Pilot Guide Updated (to reflect lessons learned and changes resulting from the Pilot)
 - Continued Development & Deployment of the long-term training approach



ECM Tool Pilot Executive Review Session - Meeting Report May 16, 2002

- Need for the ECM Tool Pilot Team will need to continue to record and act on feedback from extended Stakeholders (including FSA Business Owners, Channel Leads, Operations Partners & Department of ED CIO)

- Challenges faced and mitigation strategies for dealing with future challenges

3. The Following Action Items were Identified (& Responsible Individual):

- Begin FAFSA and CPS Pilot Orientation Processes by setting meetings with FAFSA & CPS key POCs (Steve Jarboe, Keith Wilson)

- Commence Modernization Partner Rollout activities by prioritizing MP teams for phased rollout schedule (Ron Langkamp, Steve Jarboe, Phil Wynn)

- Continue to act on GCARS/ECM Tool data transfer and interface strategy identified by Gary Adams (Gary Adams)

- Identify Long Term Owner of the ECM Tool and ensure that individual is aware of implications of ownership (Frank Kidd - Present Owner.)

- Develop a more focused communications and awareness effort with Business Channel Leads and other FSA Stakeholders (Steve Jarboe)

- Make Updates to the Tool, the User's Guide and other process documentation to reflect Pilot updates (Bruce Bruning, Steve Jarboe, Jay Niemczyk)

- Develop & circulate refined metrics for tracking FSA results based on Tool use (Ron Langkamp)

- Continue to work to improve the User ID request Process in place for adding users to the Tool (Steve Jarboe)

- Continue to work toward resolution of Access to the ECM Tool via the Internet (Ron Langkamp, Dave Lass)

4. The presentation used to facilitate the review session (including revisions agreed upon during the 5/16 review session) is attached.

Thanks to all for participation and please contact me with any questions,

Steve
202.962.0779



5_16_02 ECM Tool Pilot Exec Review Breifing Updates Incl